Pick up Management User's manual

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Handling Pickup Orders and Updating process (for handling stations)
Messaging (for both ordering and handling stations)
Pre-Authorizing Customers for Regular Pickups in the Future (for ordering stations)
Booking a pickup for Authorized Customers (for handling stations)

Introduction

' Pick Up management' is a new module built in SAM. It allows stations to make pickup orders through SAM. The orders will then be passed on to handling stations for processing. There are status (milestones) generated automatically during processing in each order, therefore, both ordering station and handling station can easily monitor the progress. The module also provides 'messaging' function. So, the communications (messages) in each order are recorded for easily follow up by anyone who takes over in the midway… With this module, you will have a full picture of all your pickup orders with their updated status under one list. And monitoring your orders becomes more efficient than ever.

Setup Requirement

The module provides auto-email function. The system will send out emails on following occasions.

1. Place a new order: auto email to handling station.
2. Acknowledge 'receive' a new order: auto email back to ordering station
3. 'Transfer' an order (if handling station thinks the order should be handled by another station) : auto email to next handling station & the ordering station
4. Processing: auto email back to ordering station
5. 'Arrive' depot: auto email back to ordering station
6. 'import' into SAM: auto email back to ordering station

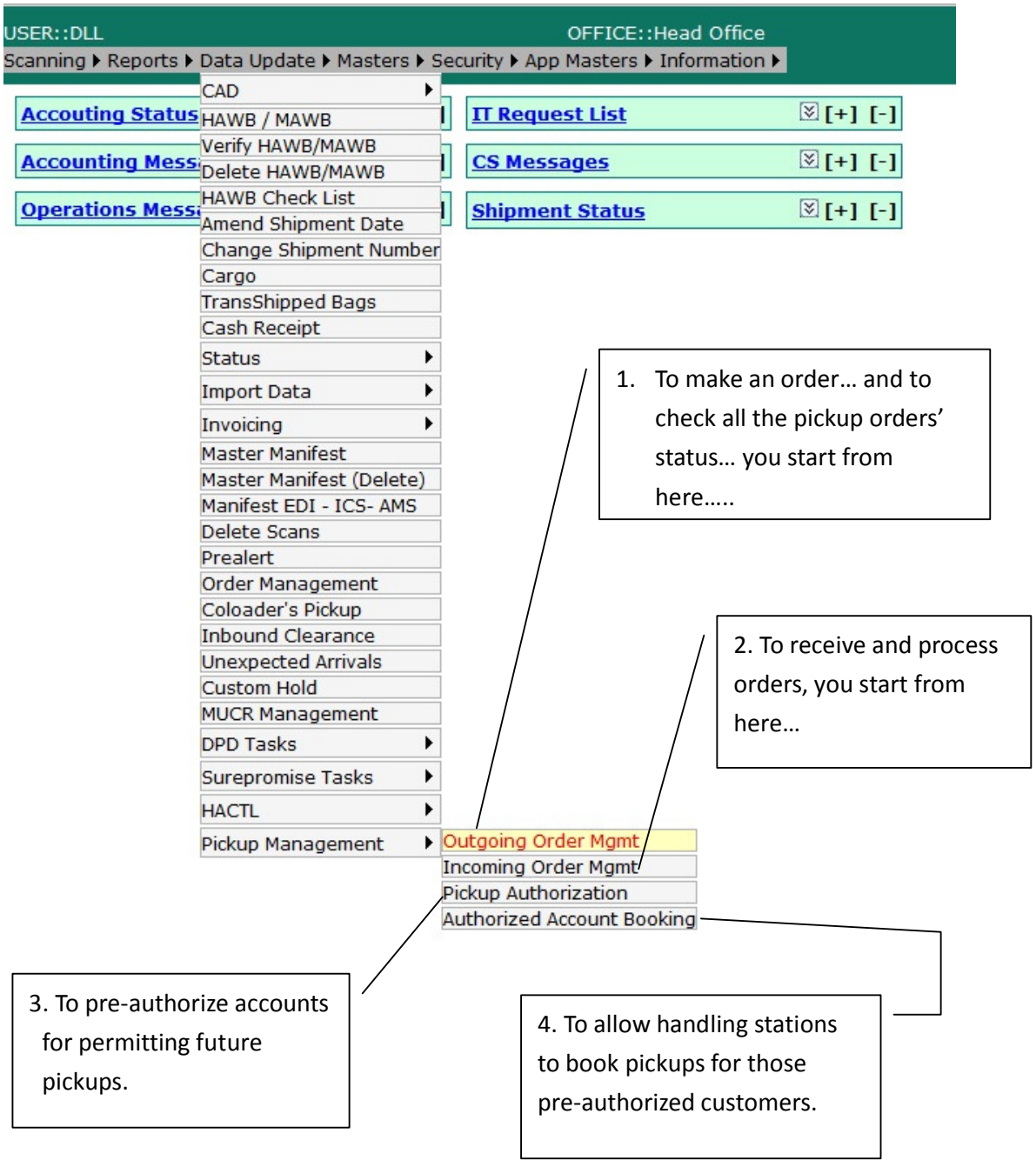
To enable the email functions, you are ***REQUIRED*** to give the IT department the email address(es) for ….

a. Placing orders and follow-ups
b. Handling orders and follow-ups

So, you can receive email alerts properly!

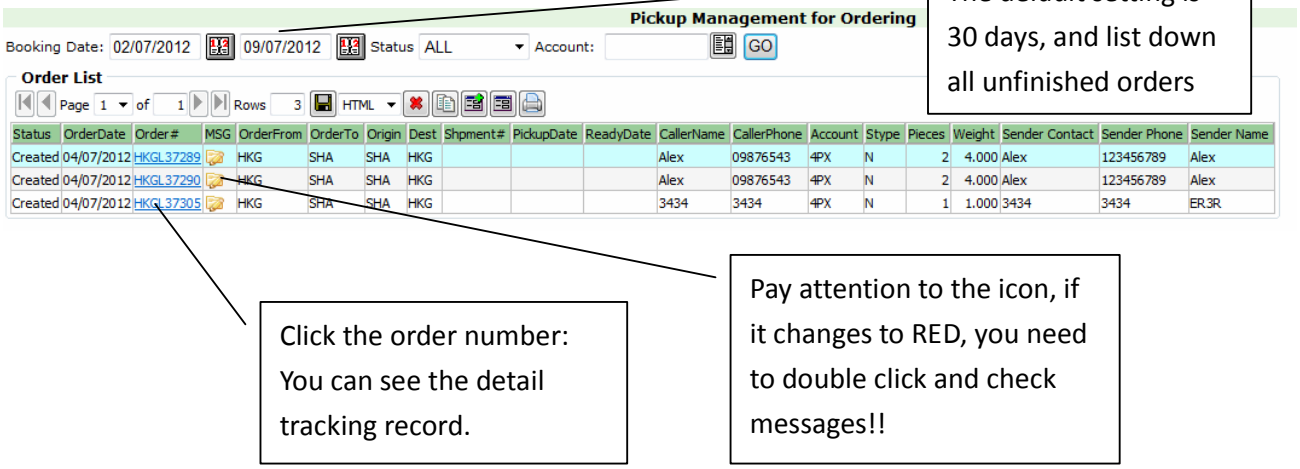
Get Started

- Below is the home page of SAM, please see explanation…..

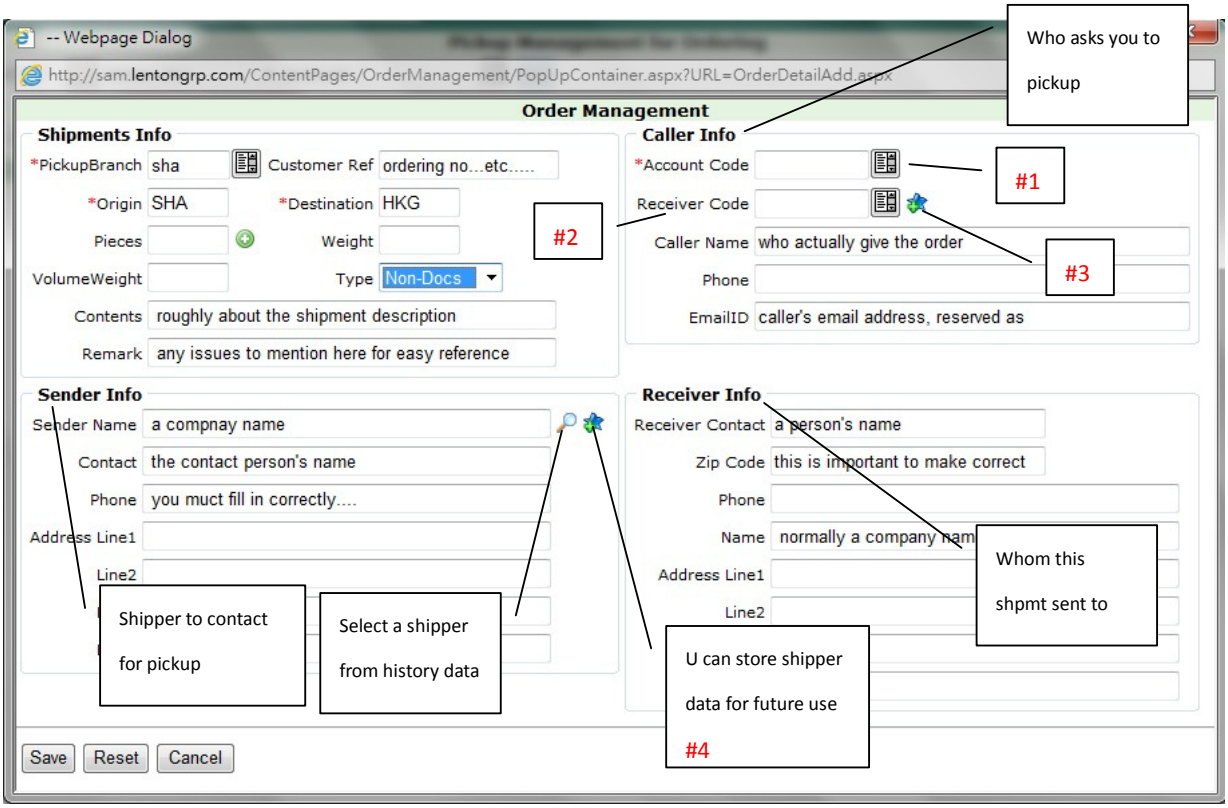


Making Pickup Orders

- ***Function Path*** : Data Update –Pickup Mgmt – Outgoing Order Mgmt.
  You will firstly see a list of unfinished orders like below…..


Pickup Management for Ordering
Booking Date: 02/07/2012 09/07/2012 Status ALL Account: GO
Order List
Page 1 of 1 Rows 3 HTML
Status OrderDate Order# MSG OrderFrom OrderTo Origin Dest Shpment# PickupDate ReadyDate CallerName CallerPhone Account Stype Pieces Weight Sender Contact Sender Phone Sender Name
Created 04/07/2012 HKGL37289 HKG SHA SHA HKG Alex 09876543 4PX N 2 4.000 Alex 123456789 Alex
Created 04/07/2012 HKGL37290 HKG SHA SHA HKG Alex 09876543 4PX N 2 4.000 Alex 123456789 Alex
Created 04/07/2012 HKGL37305 HKG SHA SHA HKG 3434 3434 4PX N 1 1.000 3434 3434 ER3R
The default setting is 30 days, and list down all unfinished orders
Click the order number: You can see the detail tracking record.
Pay attention to the icon, if it changes to RED, you need to double click and check messages!!

- ***Create a new order***:
  - Click to create a new order.
  - Enter the following order information then save it.



- Notices:

  #1: account code: you need to pick from your customer list, the billing of this order will go to this account….. (it could be an courier agent, or a direct customer…..)

  #2: receiver code: this is the actual receiver for this order…

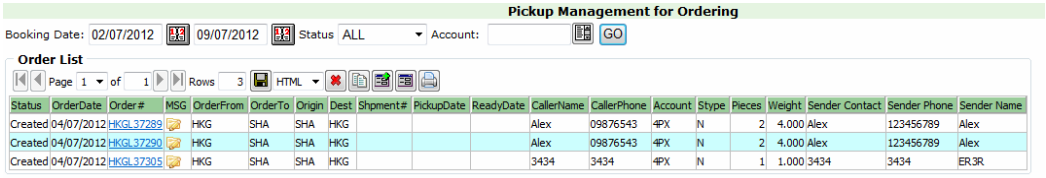
  a. It could be the same as the account mentioned in #1 (if it is a direct customer)…
  b. It could be many different receivers under one billing account… (if the billing account is an courier agent)

  #3: you can click this icon to store the receiver information, so you don't need to re-enter again in the future….

  #4: if you want to store sender's data, the receiver's data must be stored beforehand…. This is because the senders are under a certain receiver….. If there is no receiver data stored, then its sender's data can not be stored.

  #5: when you create an order, you may not know exactly the shipments pieces, weight… etc… so you can leave them empty or input an indication number….. you and the handling stations can always amend the piece, weight…etc. at a later stage..

- ***Edit an order***: (you can update or amend data at a later stage)
  - Choose (highlight) the order that you want to edit.

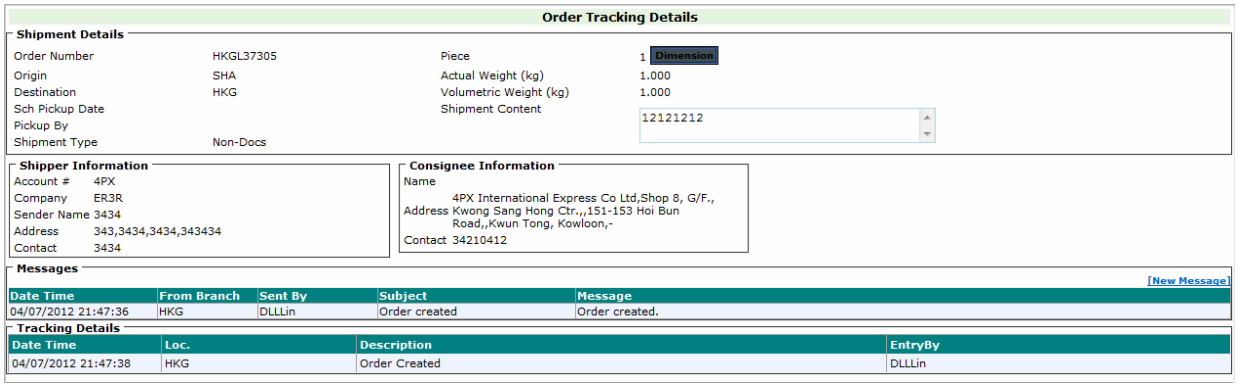


Status	OrderDate	Order#	MSG	OrderFrom	OrderTo	Origin	Dest	Shpment#	PickupDate	ReadyDate	CallerName	CallerPhone	Account	Stype	Pieces	Weight	Sender Contact	Sender Phone	Sender Name
Created	04/07/2012	HKGL37289		HKG	SHA	SHA	HKG				Alex	09876543	4PX	N	2	4.000	Alex	123456789	Alex
Created	04/07/2012	HKGL37290		HKG	SHA	SHA	HKG				Alex	09876543	4PX	N	2	4.000	Alex	123456789	Alex
Created	04/07/2012	HKGL37305		HKG	SHA	SHA	HKG				3434	3434	4PX	N	1	1.000	3434	3434	ER3R

  - Click to edit the order information and then save it.

- ***Cancel an order***:
  - Choose (highlight) the order in list and click to cancel it.

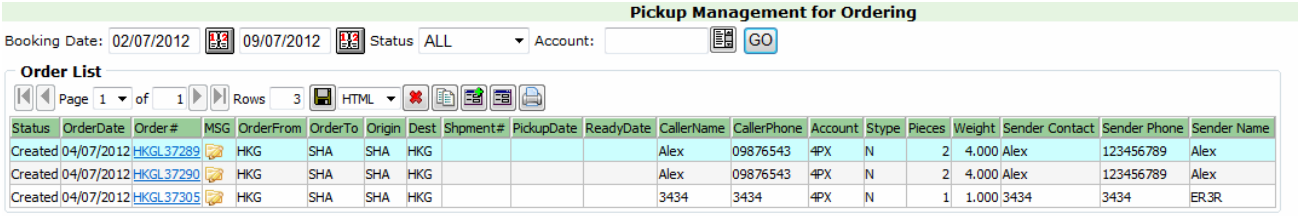
- ***Order Tracking***:
  - Click the hyperlink of Order Number, and then you would see another pop-up screen showing the full tracking records/details of this order. (similar to below screen shot)


Order Tracking Details
Shipment Details
Order Number HKGL37305
Origin SHA
Destination HKG
Sch Pickup Date
Pickup By
Shipment Type Non-Docs
Piece 1
Actual Weight (kg) 1.000
Volumetric Weight (kg) 1.000
Shipment Content 12121212
Shipper Information
Account # 4PX
Company ER3R
Sender Name 3434
Address 343,3434,3434,343434
Contact 3434
Consignee Information
Name 4PX International Express Co Ltd,Shop 8, G/F., Address Kwong Sang Hong Ctr.,,151-153 Hoi Bun Road,,Kwun Tong, Kowloon,-
Contact 34210412
Messages
[New Message]
Date Time | From Branch | Sent By | Subject | Message
04/07/2012 21:47:36 | HKG | DLLLin | Order created | Order created.
Tracking Details
Date Time | Loc. | Description | EntryBy
04/07/2012 21:47:38 | HKG | Order Created | DLLLin

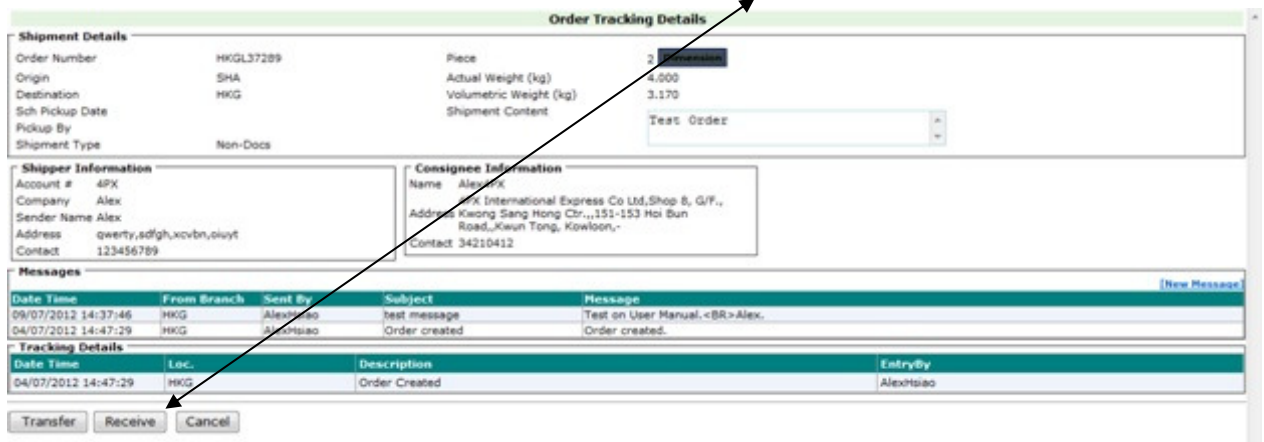
Handling Pickup Orders : (where you handle incoming orders from other stations)

- ***Function Path*** : Data Update –Pickup Mgmt – Incoming Order Mgmt.

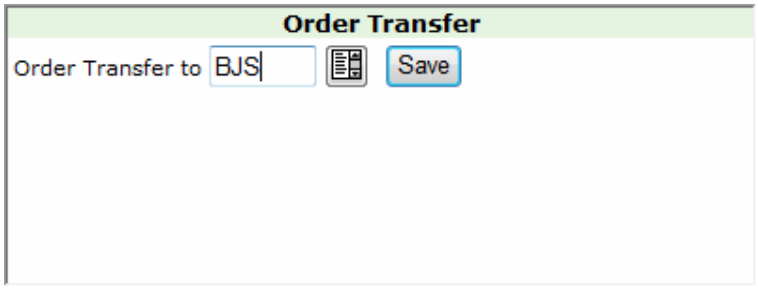
- ***List and view all incoming orders***:
  - Choose BookingDate/Status/Account then click “GO”, system would list the incoming pickup orders of your branch.


Pickup Management for Ordering
Booking Date: 02/07/2012 09/07/2012 Status ALL Account: GO
Order List
Page 1 of 1 Rows 3 HTML
Status | OrderDate | Order# | MSG | OrderFrom | OrderTo | Origin | Dest | Shpment# | PickupDate | ReadyDate | CallerName | CallerPhone | Account | Stype | Pieces | Weight | Sender Contact | Sender Phone | Sender Name
Created | 04/07/2012 | HKGL37289 | HKG | SHA | SHA | HKG | | | | Alex | 09876543 | 4PX | N | 2 | 4.000 | Alex | 123456789 | Alex
Created | 04/07/2012 | HKGL37290 | HKG | SHA | SHA | HKG | | | | Alex | 09876543 | 4PX | N | 2 | 4.000 | Alex | 123456789 | Alex
Created | 04/07/2012 | HKGL37305 | HKG | SHA | SHA | HKG | | | | 3434 | 3434 | 4PX | N | 1 | 1.000 | 3434 | 3434 | ER3R

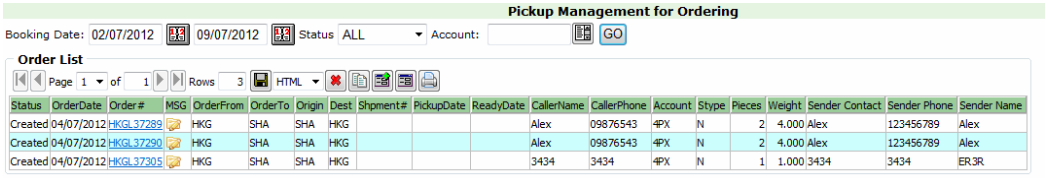
- ***Receive a new order***: (<u>you need to acknowledge receiving a new order ASAP, if this order is accepted by your station</u>)
  - The status of a **new** order is shown as ‘Created’….
  - Click the Order Number in the list and you would see the order detail. If this order is right for your station to make the pickup, please click “Receive” button.


Order Tracking Details
Shipment Details
Order Number HKGL37289
Origin SHA
Destination HKG
Sch Pickup Date
Pickup By
Shipment Type Non-Docs
Piece 2
Actual Weight (kg) 4.000
Volumetric Weight (kg) 3.170
Shipment Content Test Order
Shipper Information
Account # 4PX
Company Alex
Sender Name Alex
Address qwerty,sdfgh,xcvbn,oiuyt
Contact 123456789
Consignee Information
Name Alex
4PX International Express Co Ltd,Shop 8, G/F., Address Kwong Sang Hong Ctr.,,151-153 Hoi Bun Road,,Kwun Tong, Kowloon,-
Contact 34210412
Messages
[New Message]
Date Time | From Branch | Sent By | Subject | Message
09/07/2012 14:37:46 | HKG | AlexHsiao | test message | Test on User Manual.
Alex.
04/07/2012 14:47:29 | HKG | AlexHsiao | Order created | Order created.
Tracking Details
Date Time | Loc. | Description | EntryBy
04/07/2012 14:47:29 | HKG | Order Created | AlexHsiao
Transfer
Receive
Cancel

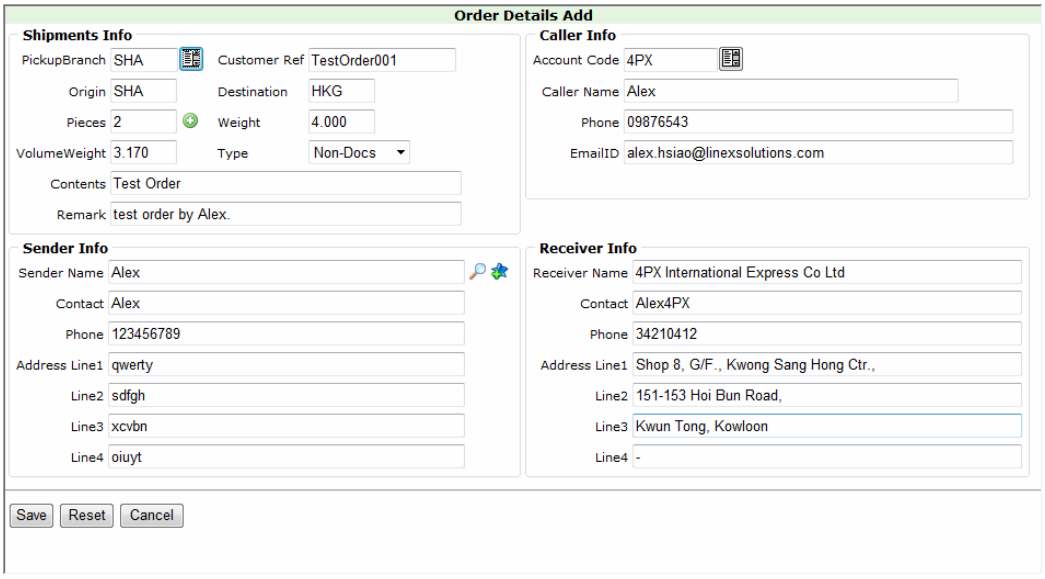
- ***Transfer an order***: If the order should be pickup by another station, please click “Transfer” button to transfer it to another correct station.



- ***Edit an order***:
  - Choose the order that you want to edit.


Pickup Management for Ordering
Booking Date: 02/07/2012 09/07/2012 Status ALL Account: GO
Order List
Page 1 of 1 Rows 3 HTML
Status OrderDate Order# MSG OrderFrom OrderTo Origin Dest Shpment# PickupDate ReadyDate CallerName CallerPhone Account Stype Pieces Weight Sender Contact Sender Phone Sender Name
Created 04/07/2012 HKGL37289 HKG SHA SHA HKG Alex 09876543 4PX N 2 4.000 Alex 123456789 Alex
Created 04/07/2012 HKGL37290 HKG SHA SHA HKG Alex 09876543 4PX N 2 4.000 Alex 123456789 Alex
Created 04/07/2012 HKGL37305 HKG SHA SHA HKG 3434 3434 4PX N 1 1.000 3434 3434 ER3R

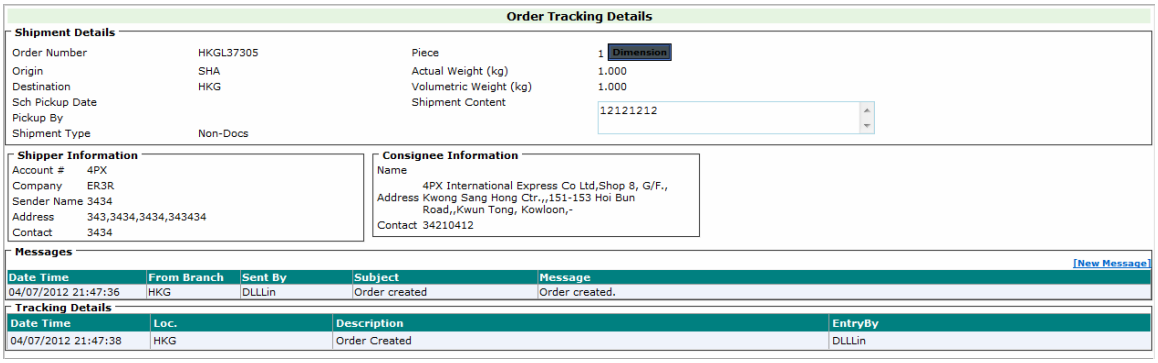
  - Click to edit the order information and then save it.



  - Notice: Pickup branch can only edit the sender (shipper) information. Please ask order-making branch to edit the receiver information if it’s needed.

- ***Order Tracking***:
  - Click the hyperlink of Order Number, and then you would see another pop-up screen

showing the full tracking records/details of this order. (Like below)



Order Tracking Details

Shipment Details

Order Number	HKGL37305	Piece	1 Dimension
Origin	SHA	Actual Weight (kg)	1.000
Destination	HKG	Volumetric Weight (kg)	1.000
Sch Pickup Date		Shipment Content	12121212
Pickup By			
Shipment Type	Non-Docs		

Shipper Information

Account #	4PX
Company	ER3R
Sender Name	3434
Address	343,3434,3434,343434
Contact	3434

Consignee Information

Name
4PX International Express Co Ltd,Shop 8, G/F., Address Kwong Sang Hong Ctr.,,151-153 Hoi Bun Road,,Kwun Tong, Kowloon,-
Contact 34210412

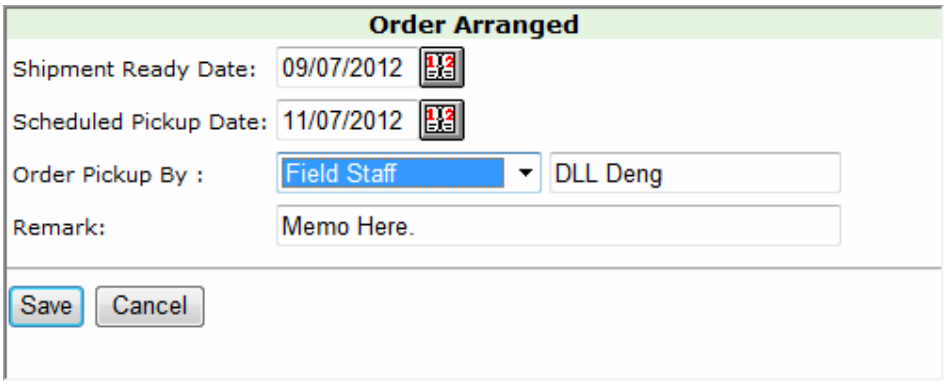
Messages [New Message]

Date Time	From Branch	Sent By	Subject	Message
04/07/2012 21:47:36	HKG	DLLLin	Order created	Order created.

Tracking Details

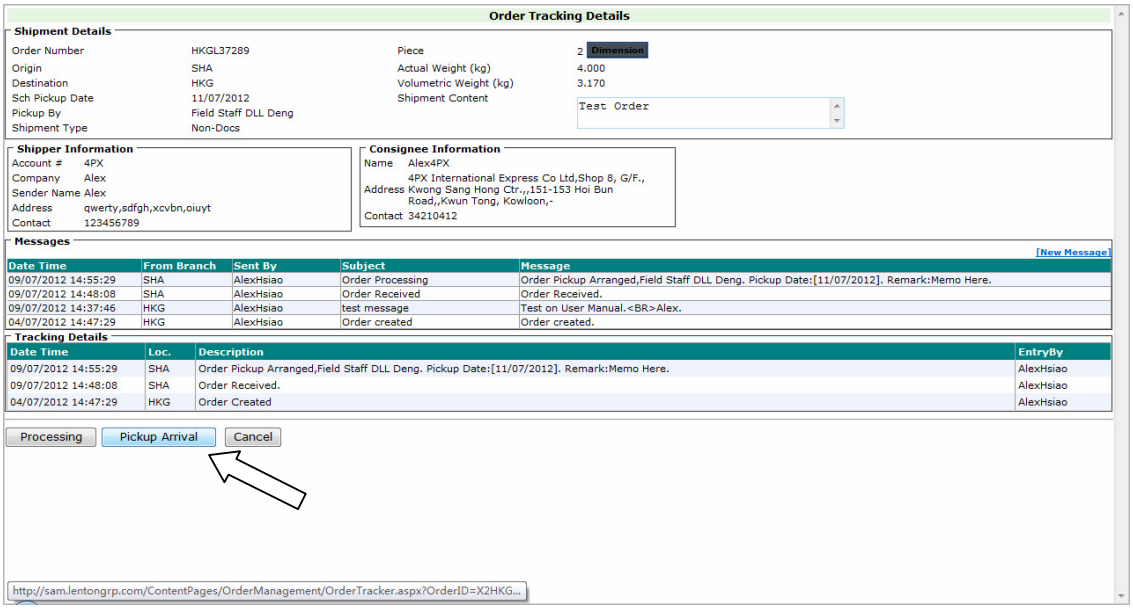
Date Time	Loc.	Description	EntryBy
04/07/2012 21:47:38	HKG	Order Created	DLLLin

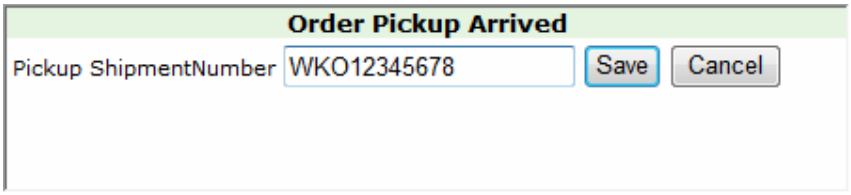
- ***Process an order***:
  - Once the order is received, you may begin to contact with the shipper to arrange your pickup.
    1. Click the 'order number' in the incoming order list to hyperlink the order detail.
    2. You will see the "Processing" button at the lower left hand side of the screen, click it..



  - Descriptions:
    - Shipment Ready Date :
    - Scheduled Pickup Date:
    - Order Pickup By : You may record the pickup method arranged and relative information here….(For example…. A staff or pickup agent's name)
    - Remark: you can key in some useful information here……(Like a delivery HAWB NO….)
  - Notice:
    - You may **REPEAT** the above process several times if the pickup arrangement is changed.

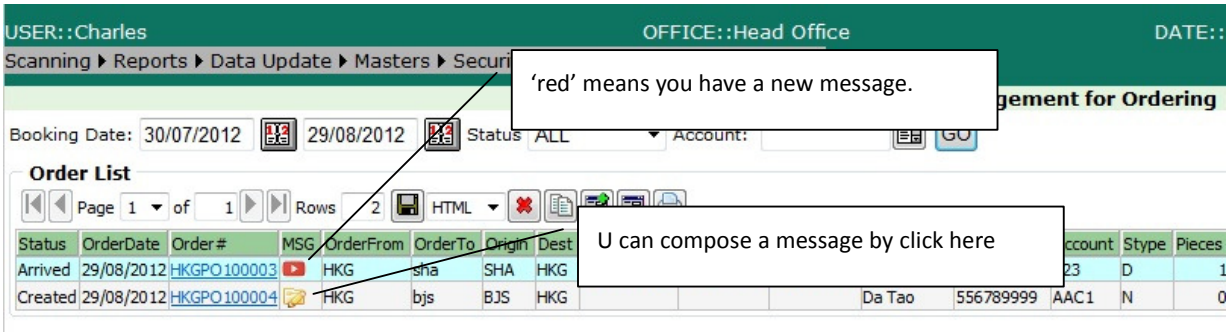
- ***Pickup Arrival***:
  - Once the shipment has been picked back into office, please click “Pickup Arrival” button and input the HAWB number for SAM. (the HAWB no. onward to overseas)


Order Tracking Details
Shipment Details
Order Number HKGL37289
Origin SHA
Destination HKG
Sch Pickup Date 11/07/2012
Pickup By Field Staff DLL Deng
Shipment Type Non-Docs
Piece 2 Dimension
Actual Weight (kg) 4.000
Volumetric Weight (kg) 3.170
Shipment Content Test Order
Shipper Information
Account # 4PX
Company Alex
Sender Name Alex
Address qwerty,sdfgh,xcvbn,oiuyt
Contact 123456789
Consignee Information
Name Alex4PX
4PX International Express Co Ltd,Shop 8, G/F., Address Kwong Sang Hong Ctr.,,151-153 Hoi Bun Road,,Kwun Tong, Kowloon,-
Contact 34210412
Messages
[New Message]
Date Time | From Branch | Sent By | Subject | Message
09/07/2012 14:55:29 | SHA | AlexHsiao | Order Processing | Order Pickup Arranged,Field Staff DLL Deng. Pickup Date:[11/07/2012]. Remark:Memo Here.
09/07/2012 14:48:08 | SHA | AlexHsiao | Order Received | Order Received.
09/07/2012 14:37:46 | HKG | AlexHsiao | test message | Test on User Manual.
Alex.
04/07/2012 14:47:29 | HKG | AlexHsiao | Order created | Order created.
Tracking Details
Date Time | Loc. | Description | EntryBy
09/07/2012 14:55:29 | SHA | Order Pickup Arranged,Field Staff DLL Deng. Pickup Date:[11/07/2012]. Remark:Memo Here. | AlexHsiao
09/07/2012 14:48:08 | SHA | Order Received. | AlexHsiao
04/07/2012 14:47:29 | HKG | Order Created | AlexHsiao
Processing
Pickup Arrival
Cancel
http://sam.lentongrp.com/ContentPages/OrderManagement/OrderTracker.aspx?OrderID=X2HKG...

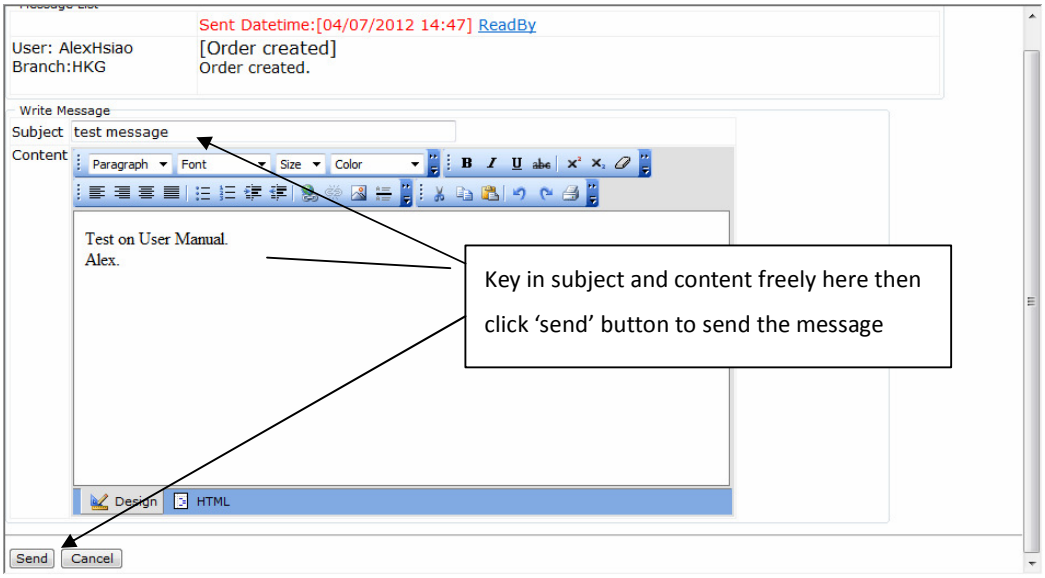


- ***Import the shipment to SAM***.
  - Click the ‘order no.’ in the incoming order list, then you will see on the lower left hand side a ‘Import’ button
  - Click “Import” button to import the shipment to SAM as a formal HAWB. And then this order can be <u>closed</u> in the order management

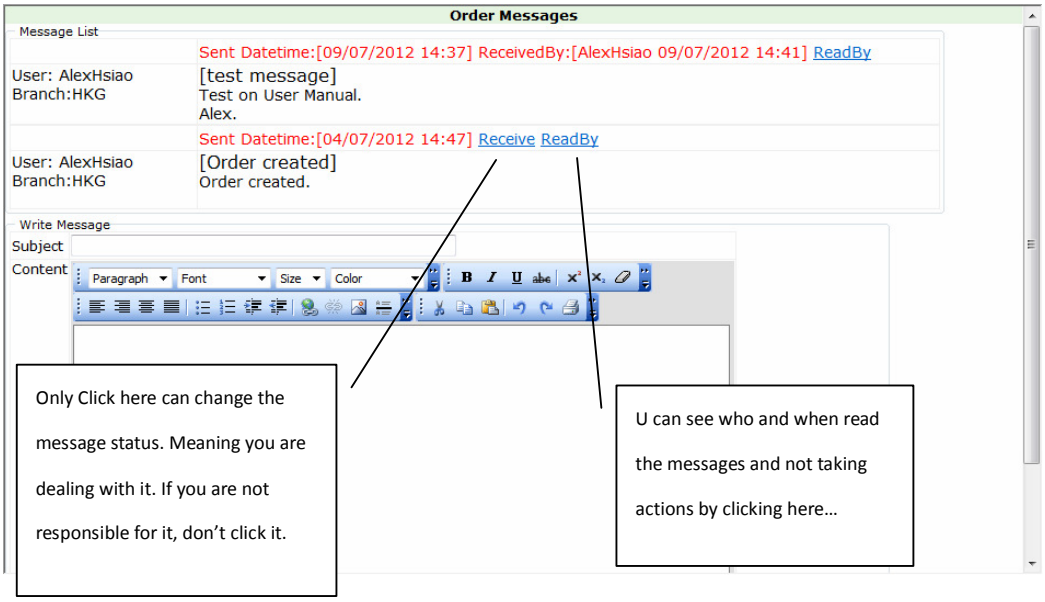
Messages: (you can send and receive messages for this order)


USER::Charles
OFFICE::Head Office
DATE::
Scanning ▸ Reports ▸ Data Update ▸ Masters ▸ Securi
‘red’ means you have a new message.
gement for Ordering
Booking Date: 30/07/2012 29/08/2012 Status ALL Account: GO
Order List
Page 1 of 1 Rows 2 HTML
U can compose a message by click here
Status | OrderDate | Order# | MSG | OrderFrom | OrderTo | Origin | Dest | ccount | Stype | Pieces
Arrived | 29/08/2012 | HKGPO100003 | HKG | sha | SHA | HKG | 23 | D | 1
Created | 29/08/2012 | HKGPO100004 | HKG | bjs | BJS | HKG | Da Tao | 556789999 | AAC1 | N | 0

- ***Compose a new message***: Click to write a new message as below.



- ***Receive or read the messages (new message)***: If there is new message for you, you would see a red icon under the message field. And you may click it to see the new message and reply as above screenshot.
  - Receive the message: If you have checked the message and acknowledge you are dealing it, please click "Receive" for it or there would always be 'read icon' shown under this pickup order. **(<u>The red icon will not disappear unless someone click 'receive'.)</u>

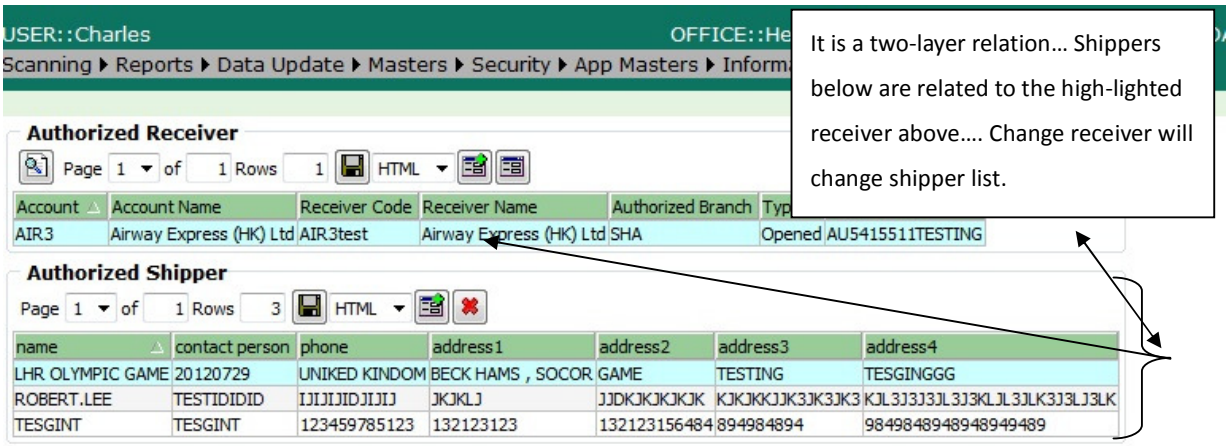


- Message read by: You can also click “ReadBy” to check if anybody has seen this message. The system will make a record each time a users has checked the messages.

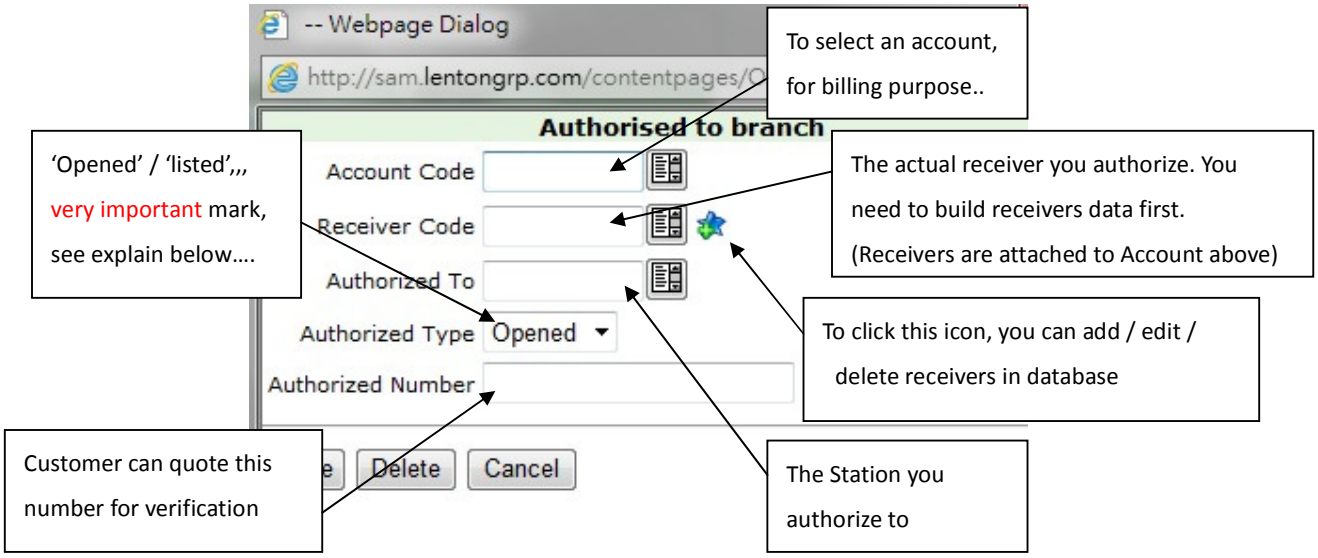
Pre-Authorizing Customers

The ordering station can build a list of authorized accounts to the handling stations in advance… . Then, any shipper contacts the handling stations for sending shipments to the pre-authorized accounts will be automatically accepted… In that case, the ordering station no longer need to create a pickup order… instead, the handling station will initiate a booking!!

- ***Function Path*** : Data Update –Pickup Mgmt –Pickup Authorization.

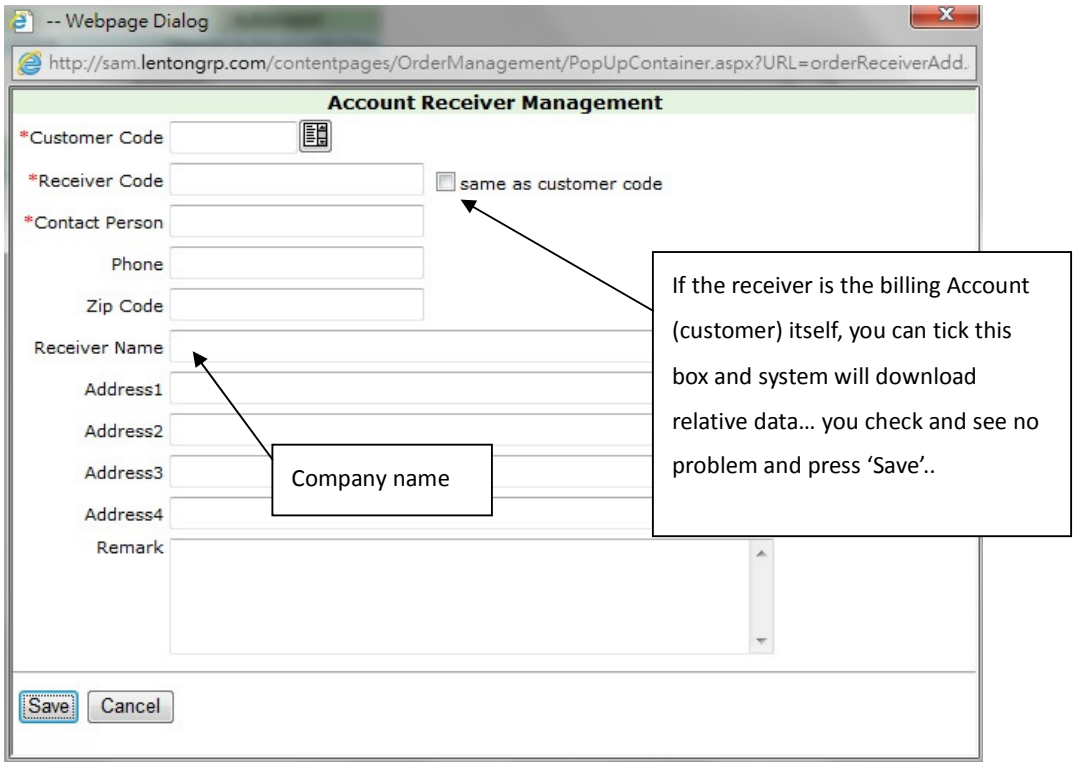

USER::Charles
Scanning ▸ Reports ▸ Data Update ▸ Masters ▸ Security ▸ App Masters ▸ Inform
Authorized Receiver
Page 1 of 1 Rows 1 HTML
Account | Account Name | Receiver Code | Receiver Name | Authorized Branch | Typ
AIR3 | Airway Express (HK) Ltd | AIR3test | Airway Express (HK) Ltd | SHA | Opened | AU5415511TESTING
Authorized Shipper
Page 1 of 1 Rows 3 HTML
name | contact person | phone | address1 | address2 | address3 | address4
LHR OLYMPIC GAME | 20120729 | UNIKED KINDOM | BECK HAMS , SOCOR | GAME | TESTING | TESGINGGG
ROBERT.LEE | TESTIDIDID | IJIJIJIDJIJIJ | JKJKLJ | JJDKJKJKJKJK | KJKJKKJJK3JK3JK3 | KJL3J3J3JL3J3KLJL3JLK3J3LJ3LK
TESGINT | TESGINT | 123459785123 | 132123123 | 132123156484 | 894984894 | 9849848948948949489
It is a two-layer relation… Shippers below are related to the high-lighted receiver above…. Change receiver will change shipper list.

- ***To authorize a new account (receiver)***:
  - Click on the icon, and you will see the screen below. Key in data and ‘save’


-- Webpage Dialog
http://sam.lentongrp.com/contentpages/O
Authorised to branch
Account Code
Receiver Code
Authorized To
Authorized Type Opened
Authorized Number
Delete
Cancel
To select an account, for billing purpose..
‘Opened’ / ‘listed’,,, very important mark, see explain below….
The actual receiver you authorize. You need to build receivers data first. (Receivers are attached to Account above)
To click this icon, you can add / edit / delete receivers in database
Customer can quote this number for verification
The Station you authorize to

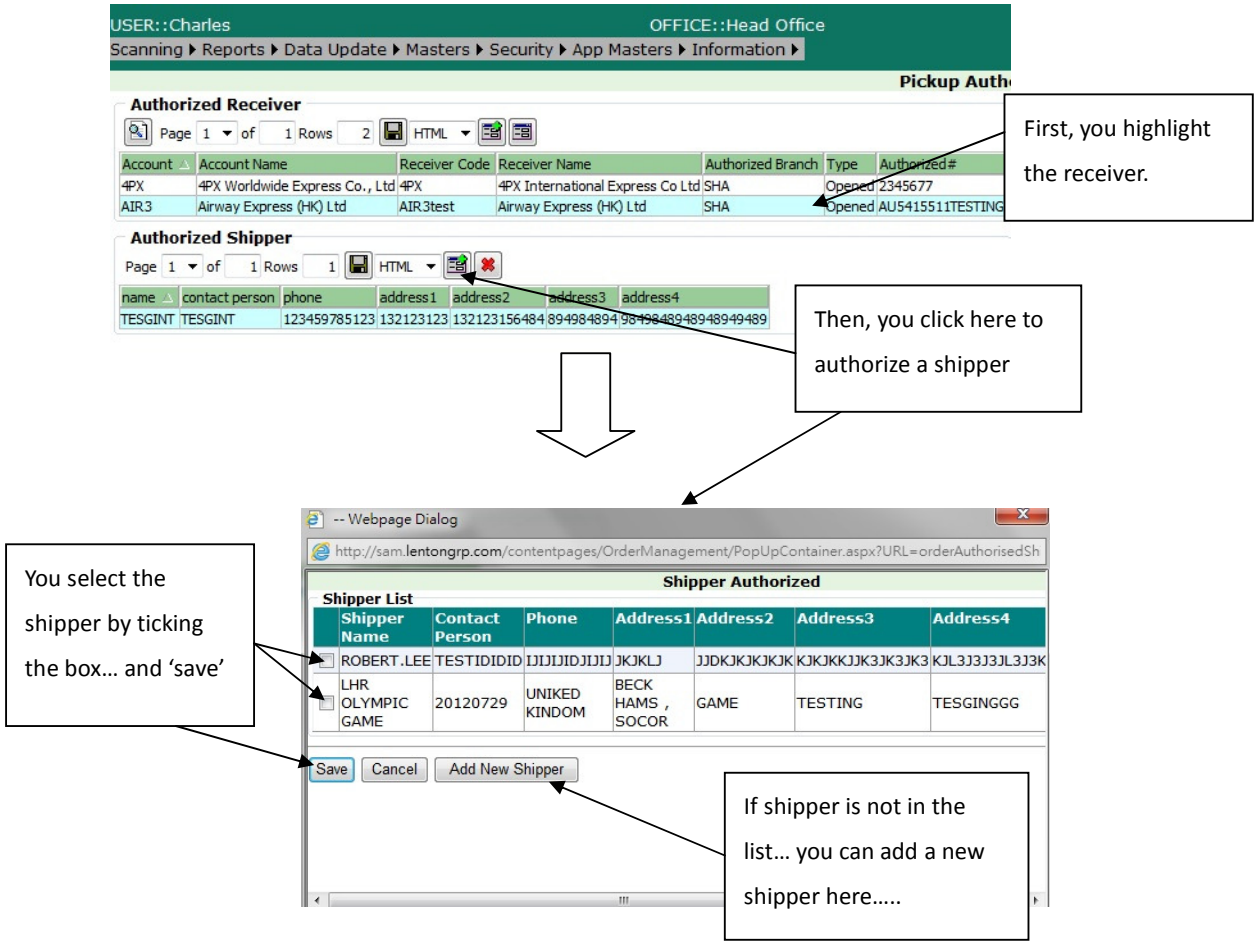
- Notice: Authorized Type… (very important)
  1. Opened: it means any shipper can send shipments to this authorized receiver…(no need to authorize each shipper…)
  2. Listed: it means not only authorize the receiver, you also need to authorize it's correspondent shippers as well. …. A shipper not in the authorized list, will not be accepted….

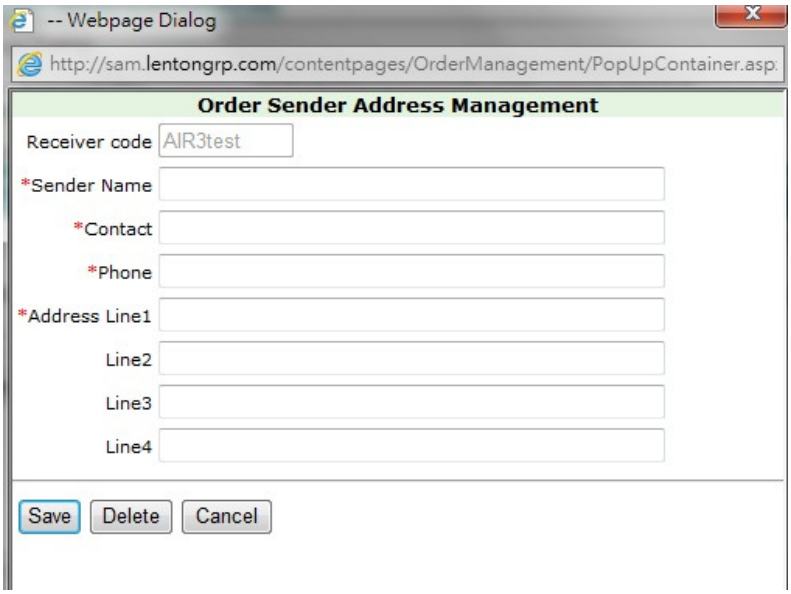
- To create a receiver in database:
  - Receiver is related to the Account (Customer code)
  - Even if receiver is the account/customer itself, you still need to create the receiver as well. But you can simplify it by ticking 'same as customer code'….



- ***To authorize a shipper under a authorized receiver:***
  - Firstly, the receiver must be authorized in advance.
  - If the 'authorized type' of the receiver is 'Opened'.
    - You don't necessarily to authorize the correspondent shippers…. Your or the handling station can add/edit shippers data at later stage….. However, it is always good to store every shipper's data in advance..
  - If the 'authorized type' of the receiver is 'listed'…

- You MUST (and only you can) authorize all correspondent shippers in advance…. (the handling stations can not add / edit the sipper's data)


USER::Charles
OFFICE::Head Office
Scanning ▸ Reports ▸ Data Update ▸ Masters ▸ Security ▸ App Masters ▸ Information ▸
Pickup Auth
Authorized Receiver
Page 1 of 1 Rows 2 HTML
Account | Account Name | Receiver Code | Receiver Name | Authorized Branch | Type | Authorized#
4PX | 4PX Worldwide Express Co., Ltd | 4PX | 4PX International Express Co Ltd | SHA | Opened | 2345677
AIR3 | Airway Express (HK) Ltd | AIR3test | Airway Express (HK) Ltd | SHA | Opened | AU5415511TESTING
Authorized Shipper
Page 1 of 1 Rows 1 HTML
name | contact person | phone | address1 | address2 | address3 | address4
TESGINT | TESGINT | 123459785123 | 132123123 | 132123156484 | 894984894 | 9849848948948949489
First, you highlight the receiver.
Then, you click here to authorize a shipper
You select the shipper by ticking the box… and 'save'
-- Webpage Dialog
http://sam.lentongrp.com/contentpages/OrderManagement/PopUpContainer.aspx?URL=orderAuthorisedSh
Shipper Authorized
Shipper List
Shipper Name | Contact Person | Phone | Address1 | Address2 | Address3 | Address4
ROBERT.LEE | TESTIDIDID | IJIJIJIDJIJIJ | JKJKLJ | JJDKJKJKJKJK | KJKJKKJJK3JK3JK3 | KJL3J3J3JL3J3K
LHR OLYMPIC GAME | 20120729 | UNIKED KINDOM | BECK HAMS , SOCOR | GAME | TESTING | TESGINGGG
Save Cancel Add New Shipper
If shipper is not in the list… you can add a new shipper here…..



Booking a pickup for Authorized Customers

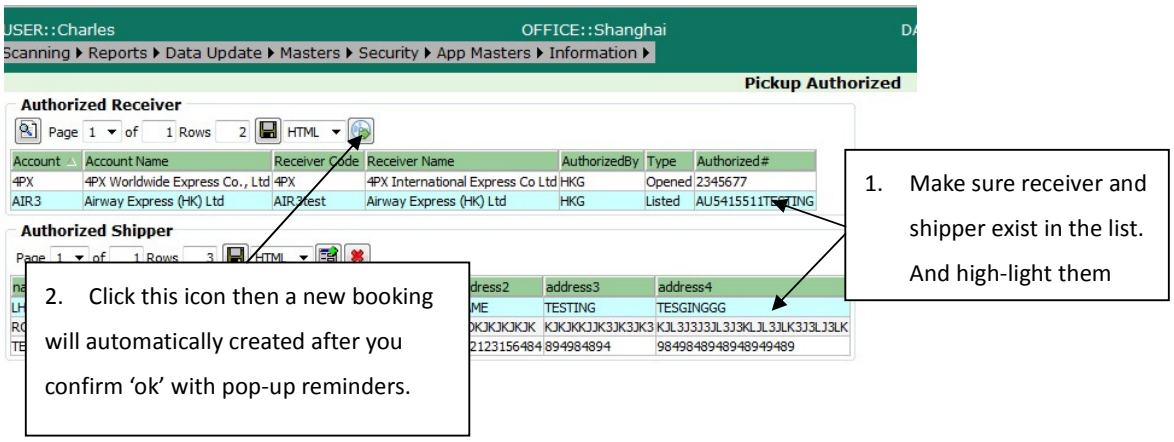
While a handling station receive a call from a shipper requesting for a shipment pickup, the handling station MUST check if the shipper and it's correspondent receiver is in the authorized list…

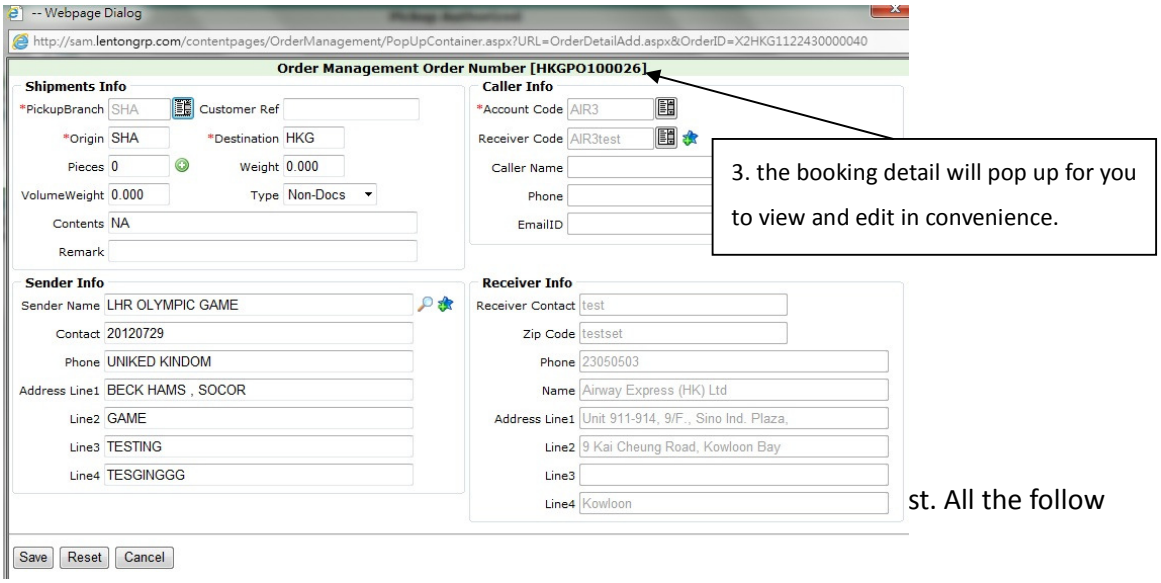
A. If the receiver is NOT in the authorized list, handling station must inform ordering stations to re-confirm this business, and ordering stations must create a pickup order for this shipment or to authorize the receiver to the handling stations…..

B. If the receiver is in the authorized list. You need to check the 'authorized type'…

1. If the authorized type is 'Opened', you can accept the business and make a booking order.
2. If the authorized type is 'Listed', you need to make one more check if the shipper is in the authorized shipper list or not….. if the shipper is in the list, then you can accept the business. If the sipper is not in the list… you need to inform ordering station. The ordering station shall authorize the shipper or create a pickup order for you to process the operation in SAM.

- ***Function Path*** : Data Update –Pickup Mgmt –Authorized Account Booking.


USER::Charles
OFFICE::Shanghai
Scanning ▸ Reports ▸ Data Update ▸ Masters ▸ Security ▸ App Masters ▸ Information ▸
Pickup Authorized
Authorized Receiver
Authorized Shipper
1. Make sure receiver and shipper exist in the list. And high-light them
2. Click this icon then a new booking will automatically created after you confirm 'ok' with pop-up reminders.



- ■ st. All the follow

up steps are exactly the same as the incoming order procedure.

- Notices: As a handling station.
    1. You are not able to authorize a new receiver… if you need a new receiver authorized, you should contact ordering station to authorize it on SAM…
    2. If the authorized receiver type is ‘listed’, you are not able to add new shippers. As this is the power of the ordering station. Again, you need to ask ordering station to authorize a new shipper through SAM.
    3. If the authorized receiver type is ‘Opened’, you are allowed to add new shippers…